



Maintaining an Employee's Work Schedule Overview

This Job Aid provides step-by-step instructions for assigning employee Work Schedules in Cardinal.

You can run the **Employee Schedule Review (RTA717)** query to review employee schedule information. For further information about this query, see the Job Aid titled **HCM Reports Catalog**.

This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

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Assigning an Employee's Work Schedule

1. To enter an employee's Work Schedule, access the **Assign Work Schedule** page using the following path:

Navigator > Manager Self Service > Time Management > Manage Schedules > Assign Work Schedule

The **Assign Work Schedule Search** page displays.

2. Search for the applicable employee by entering the Employee ID or known portion of the Employee ID in the **Empl ID** field.

Note: You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.
4. If multiple employees match the search criteria entered, the search results will display in the bottom portion of the page and you must click the **Empl ID** link for the applicable employee. If not, proceed to Step 5.



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The **Assign Work Schedule** page displays with the **Primary Schedule** tab displayed by default.

Assign Work Schedule

Employee ID [redacted]
Gen Admin Manager IV
Employment Record 0

Assign Schedules ?

Primary Schedule | Alternate Schedule

*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Show Schedule
01/13/2020	Use Default Schedule				Show Schedule + -

View history of Schedule Assignments, including default changes

Save Return to Search Previous in List Next in List Refresh Update/Display Include History Correct History

- The **Effective Date** field defaults to the current system date. Update this date using the **Effective Date Calendar** icon as needed.

Note: The effective date should be the actual date for the updates to take effect. For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

- The **Assignment Method** field defaults to “**Use Default Schedule**”. Change this to “**Select Predefined Schedule**” using the dropdown button.

The **Assign Work Schedule** page refreshes.

Assign Work Schedule

Employee ID [redacted]
Gen Admin Manager IV
Employment Record 0

Assign Schedules ?

Primary Schedule | Alternate Schedule

*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Show Schedule
01/13/2020	Select Predefined Schedule				Show Schedule + -

View history of Schedule Assignments, including default changes

Save Return to Search Previous in List Next in List Refresh Update/Display Include History Correct History



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7. Select the applicable Schedule Group using the **Schedule Group** field **Look Up** icon. The Schedule Group determines which schedule options (Schedule IDs) are available for selection. There are two types of Schedule Groups available which are listed below:
 - a. **STATE Schedule Group** – the schedule options (Schedule IDs) available for selection are used across all state agencies. Select this option unless there is a schedule that is unique for your agency
 - b. All other **Agency Specific (Business Unit) Schedule Groups** – the schedule options (Schedule IDs) available for selection include weekly schedules that are uniquely configured for the agency (business unit). The use of a Variable schedule (24 hours/7 days) is only found under the agency specific Schedule Groups

The screenshot shows the 'Assign Work Schedule' interface. At the top, there's a header with 'Assign Work Schedule' and a 'New Window' link. Below this, there's a section for 'Employee ID' and 'Employment Record'. The main area is titled 'Assign Schedules' and contains a table with columns: *Effective Date, *Assignment Method, Schedule Group, Schedule ID, Description, and Show Schedule. The 'Schedule ID' column is highlighted with a red box. Below the table, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Refresh', 'Update/Display', 'Include History', and 'Correct History'.

8. Select the applicable Schedule ID using the **Schedule ID** field **Look Up** icon. Select the schedule that is appropriate for the employee.

Note: Schedule IDs are smart coded, start with the applicable number of hours, and incorporate the on/off pattern of work days for a two-week pay period. See the **Work Schedule Naming Convention** section of this Job Aid for additional information.

The **Assign Work Schedule** page refreshes.

The screenshot shows the 'Assign Work Schedule' interface after a refresh. The table now has an additional column, 'Rotation ID'. The 'Description' and 'Rotation ID' columns are highlighted with a red box. The 'Show Schedule' column also has a 'Show Schedule' button. The 'Schedule ID' column now contains the value '40.00-Z8888Z-0'. Below the table, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Refresh', 'Update/Display', 'Include History', and 'Correct History'.



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9. The **Description** and **Rotation ID** fields default based on the Schedule ID selected. The Rotation ID denotes either:
 - a. The relative day(s) in the schedule pattern where the employee will be off. In this example, the Rotation ID of **"SASU"** indicates that the 2 days off together each week are Saturday and Sunday
 - OR
 - b. When a schedule can vary from one week to the next week, you must select which of those weeks needs to be the start week. The correct Rotation ID needs to be selected based on the employee's first day in the weekly pattern and that is the effective date for the start of that schedule

Note: The Rotation IDs available for selection will vary based on the Schedule ID. See the **Schedule Examples** section of this Job Aid for additional information.

10. Click the **Show Schedule** link to view a visual representation of the schedule and confirm that the correct schedule was selected.

The **Schedule Calendar** page displays in a pop-up window.

Day	Date	Workday ID	Shift ID	Sched Hrs	Shift Detail
Monday	01/13/2020			8.00	Shift Detail
Tuesday	01/14/2020			8.00	Shift Detail
Wednesday	01/15/2020			8.00	Shift Detail
Thursday	01/16/2020			8.00	Shift Detail
Friday	01/17/2020			8.00	Shift Detail
Saturday	01/18/2020				
Sunday	01/19/2020				

11. Review the schedule information. Once confirmed as correct, click the **OK** button.



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The **Assign Work Schedule** page returns.

Assign Work Schedule

Employee ID [redacted]
Gen Admin Manager IV
Employment Record 0

Assign Schedules ?

Primary Schedule Alternate Schedule

*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Rotation ID	Show Schedule
01/13/2020	Select Predefined Schedule	STATE	40.00-Z88888Z-0	5x8 hour days - 2 OFF together	SASU	Show Schedule

View history of Schedule Assignments, including default changes

Save Return to Search Previous in List Next in List Refresh Update/Display Include History Correct History

- Click the **Save** button.

Note: If you are attempting to update a historical or current effective dated row, the below error message will display which indicates that you are entering the schedule change on the incorrect effective dated row. Check to be sure you are making the change on the new row, which displays at the top. If there is a historical change or correction that is required, you will need to open a Help Desk ticket to have the Cardinal Post Productive Support (PPS) complete the correction.

Cannot change current or history records unless in Correction mode. (15,1)

You have attempted to change a record that is effective dated, and the record contains an effective date that makes it either the current record or a historical record. Either use the Add (+) button to create a new record with a future effective date, or change your mode to Correction.

OK

- Click the **OK** button to close this message.



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Setting Up Multiple Schedule Changes

If you need to enter both a normal schedule and a temporary schedule change for an employee, Cardinal allows you to set up a future effective dated schedule change. The **Alternate Schedule** tab is not utilized in Cardinal.

1. Repeat steps 1-12 from the **Assigning an Employee's Work Schedule** section of this Job Aid to create the employee's normal schedule.

The screenshot shows the 'Assign Work Schedule' interface. At the top, there's a header with 'Employee ID' and 'Employment Record 0'. Below this, there's a section for 'Assign Schedules' with tabs for 'Primary Schedule' and 'Alternate Schedule'. A table with the following columns is visible: 'Effective Date', 'Assignment Method', 'Schedule Group', 'Schedule ID', 'Description', 'Rotation ID', and 'Show Schedule'. The table contains one row with the following data: '01/13/2020', 'Select Predefined Schedule', 'STATE', '40.00-Z88888Z-0', '5x8 hour days - 2 OFF together', 'SASU', and a 'Show Schedule' link. To the right of the 'Show Schedule' link are two buttons: a red '+' button and a '-' button. Below the table, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Refresh', 'Update/Display', 'Include History', and 'Correct History'.

2. Click the **Add a New Row** icon (+).

The **Assign Work Schedule** page refreshes with an additional row. The new row displays at the top of the table.

The screenshot shows the 'Assign Work Schedule' interface after adding a new row. The table now has two rows. The first row is highlighted with a red border and contains the following data: '07/18/2020', 'Select Predefined Schedule', 'STATE', '40.00-Z88888Z-0', '5x8 hour days - 2 OFF together', 'SASU', and a 'Show Schedule' link. The second row contains the following data: '01/13/2020', 'Select Predefined Schedule', 'STATE', '40.00-Z88888Z-0', '5x8 hour days - 2 OFF together', 'SASU', and a 'Show Schedule' link. To the right of the 'Show Schedule' link are two buttons: a red '+' button and a '-' button. Below the table, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Refresh', 'Update/Display', 'Include History', and 'Correct History'.

3. The new row populates with the information from the current row. The **Effective Date** field defaults to the current system date. Update this date to the date that the change needs to take effect using the **Effective Date Calendar** icon.

Note: The effective date should be the actual date for the updates to take effect. For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



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- Update the **Schedule Group**, **Schedule ID**, and **Rotation ID** fields as needed. Refer to the **Assigning an Employee's Work Schedule** section of this Job Aid as needed for specific data entry requirements and information.

The updated **Assign Work Schedule** page displays.

New Window | Help | Personalize

Assign Work Schedule

Employee ID [REDACTED]

Gen Admin Manager IV

Employment Record 0

Actions

Assign Schedules ?

Primary Schedule

Alternate Schedule

123

*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Rotation ID	Show Schedule		
07/18/2020	Select Predefined Schedule	STATE	40.00-4X10+5X8-0	4x10 TuSaSu OFF / 5x8 TuFr OFF	WK1	Show Schedule	+	-
01/13/2020	Select Predefined Schedule	STATE	40.00-Z8888Z-0	5x8 hour days - 2 OFF together	SASU	Show Schedule	+	-

View history of Schedule Assignments, including default changes

Save

Return to Search

Previous in List

Next in List

Refresh

Update/Display

Include History

Correct History

- Click the **Save** button.



Work Schedule Naming Convention

Below are some examples of how **Schedule ID's** are named.

SETID = STATE, 7-Day

Format: NN.NN-AAAAAAA-B, Example: 40.00-Z88888Z-0

Character	Defines	Value
NN.NN	Schedule Hours for the week	Example: 40.00, 37.5
AAAAAAA	7 day indicator – first character is Day 1, second character is Day 2, etc.	0-9, A-X: for example Z – Off Day 0 – If the hours for the day are between 0.01 and 0.99 1 – If the hours for the day are between 1.00 and 1.99 A – If the hours for the day are between 10.00 and 10.99 B – If the hours for the day are between 11.00 and 11.99 X – If the hours for the day are 24.00
B	Indicates a unique schedule	0-9, A-Z – to indicate a unique schedule

SETID = STATE, 9X80

Format: 9X80-AAAAAAA-B, Example: 9X80-Z9998ZZ-0

Character	Defines	Value
AAAAAAA	7 day indicator – first character is Day 1, second character is Day 2, etc.	0-9, A-X: for example Z – Off Day 0 – If the hours for the day are between 0.01 and 0.99 1 – If the hours for the day are between 1.00 and 1.99 A – If the hours for the day are between 10.00 and 10.99 B – If the hours for the day are between 11.00 and 11.99 X – If the hours for the day are 24.00
B	Indicates a unique schedule	0-9, A-Z – to indicate a unique schedule

Note: 9X80 schedules must not be assigned to nonexempt employees.

Day 1 in the 14 day schedule will correspond to a Biweekly Pay Period Begin Date in Cardinal – used by Hourly employees.



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SETID = <Business Unit>

Format: NN.NN-AAAAAAA-B, Example: 40.00-5X8X3WK-0

Character	Defines	Value
NN.NN	Schedule Hours for the week	Example: 40.00, 37.5
AAAAAAA	7 day indicator – first character is Day 1, second character is Day 2, etc.	Example: 4X10+5X8 – Week 1 is a 4 day/10 hour work week, and Week 2 is a 5 day/8 hour work week. 4X10X2WK - Week 1 is a 4 day/10 hour work week, and Week 2 is also a 4 day/10 hour work week, however the work days are not the same for each week. 4X10+OTH – Week 1 is a 4/day/10 hour work week, and Week 2 is some other type of work week that is not 5X8 or 4x10.
B	Indicates a unique schedule	0-9, A-Z – to indicate a unique schedule



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Sample Screenshots of Schedules and Schedule Calendar Pages

Below are some examples of schedules and shows the **Assign Work Schedule** page and the **Schedule Calendar** pages for that example.

Sample – Rotating Schedule

Assign Work Schedule page:

Assign Work Schedule

Employee ID [redacted]
Cor Ent Systems Analyst
Employment Record 0

Assign Schedules ?

Primary Schedule | Alternate Schedule

*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Rotation ID	Show Schedule
11/10/2019	Select Predefined Schedule	STATE	40.00-4X10X2WK-4	4x10 - SuThFr / MoTuSa	WK2	Show Schedule

View history of Schedule Assignments, including default changes

Save | Return to Search | Previous in List | Next in List | Refresh | Update/Display | Include History | Correct History

Note: The correct Rotation ID needs to be selected based on the employee's first day in the weekly pattern and that is the effective date for the start of that schedule.

For this example, the employee's start date to work falls on the Monday of the second week. Use the **Show Schedule** link to verify the correct **Rotation ID** is selected.

Schedule Calendar page:

Schedule Calendar

From Date 11/10/2019 | Load Calendar | Previous Period | Next Period | Compare Rotations

Day	Date	Workday ID	Shift ID	Sched Hrs	Shift Detail
Sunday	11/10/2019			10.00	Shift Detail
Monday	11/11/2019				
Tuesday	11/12/2019				
Wednesday	11/13/2019			10.00	Shift Detail
Thursday	11/14/2019			10.00	Shift Detail
Friday	11/15/2019			10.00	Shift Detail
Saturday	11/16/2019				
Sunday	11/17/2019				
Monday	11/18/2019			10.00	Shift Detail

Note: Use the **Compare Rotations** link to identify the week that starts with employee's start date on a Monday as needed (in this example, it is week 2 which begins on Monday, November 18, 2019).



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Sample - Variable Schedule

Assign Work Schedule page:

Assign Work Schedule New Window | Help

Employee ID

Corr Ent Systems Analyst Employment Record 0

Actions ▾

Assign Schedules ?

Primary Schedule Alternate Schedule ||▸

*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Show Schedule		
11/10/2019	Select Predefined Schedule ▾	77700	VARIABLE	Variable Schedule	Show Schedule	+	-

▸ View history of Schedule Assignments, including default changes

Save Return to Search Previous in List Next in List Refresh Update/Display Include History Correct History

Schedule Calendar page:

Schedule Calendar × Help

Employee ID

Employment Record Nbr 0

Schedule Group 77700 Department of Juvenile Justice

Schedule ID VARIABLE Variable Schedule

From Date 11/10/2019 Load Calendar Previous Period Next Period

Schedule Calendar

Shift Time Configurable Totals ||▸

Day	Date	Workday ID	Shift ID	Sched Hrs	Shift Detail
Sunday	11/10/2019	VARIABLE		24.00	Shift Detail

OK Cancel Refresh

Note: If an employee has a Variable Schedule, the **Sched Hrs** field displays “24.00”. This schedule is used for positive time reporters whose schedule is so varied that they must report all hours.